

POSITION DUTY STATEMENT

PM-0924 (REV 04/2021)

CLASSIFICATION TITLE Sr Transportation Planner	OFFICE/BRANCH/SECTION Caltrans Office on Race and Equity	
WORKING TITLE Equity Index Tool Program Manager	POSITION NUMBER 913-110-4724-912	EFFECTIVE DATE 10/01/2021

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

GENERAL STATEMENT:

Under the direction of the Supervising Transportation Planner, Caltrans Office on Race and Equity (CORE) Program Manager, the Senior Transportation Planner is responsible for performing a variety of complex duties including, providing technical assistance to enhance transportation equity within the state. The incumbent will lead Caltrans organizational development of the Equity Index Tool (EQI). The responsibilities include facilitating work group meetings, ensuring progress between meetings; Identifying and developing research and metrics that support equity and livability goals; reviewing documents, creating reports and other communication materials; responsible for monitoring and providing subject matter expertise on current and future legislation as it pertains to racial equity metrics.

The EQI Pilot will identify, and measure undeserved communities by using environmental, mobility, accessibility, and socioeconomic information to produce a transportation equity score for piloted census tracts across the state. Primarily, this pilot research will demonstrate how quantitative analysis and data-driven methodology can be used by the Department to identify disadvantaged communities statewide based on a series of transportation and equity indicators. The EQI pilot development will give the Department a process which produces a comparable, benchmark metric that can be used to prioritize projects through an equity lens.

CORE COMPETENCIES:

As a Sr Transportation Planner, the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Equity, Innovation)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation)
- **Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Problem-solving and Decision-making :** Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Fostering Diversity:** Capable of working with a diverse work group, including but not limited to differences in race, nationality, culture, age, gender, and differently able. Makes everyone feel valuable regardless of diversity in personality, culture, or background. Fosters a diverse culture to create best solutions. (Safety First, Advance Equity and Livability in all Communities - Equity)
- **Understanding Others/Motivation:** Understands why groups do what they do and their motivation. Is able to look from multiple perspectives in order to understand others. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)
- **Communication:** Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, Integrity, Pride)

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- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Enhance and Connect the Multimodal Transportation Network, Strengthen Stewardship and Drive Efficiency, Lead Climate Action, Advance Equity and Livability in all Communities - Equity, Innovation, Integrity)
- **Computer literacy and application:** Appropriate knowledge of computer applications and other tools necessary to successfully perform tasks. (Enhance and Connect the Multimodal Transportation Network, Lead Climate Action - Equity, Innovation)

TYPICAL DUTIES:

Percentage		Job Description
Essential (E)/Marginal (M) ¹		
50	E	Lead the development of the Equity Index Tool. Including the collection, organization, review, and editing of data that will be utilized for equity metrics and indicators; Lead technical and analytical tasks necessary to create, test, and solicit feedback on the pilot index tools. Collaborate with other staff in developing computer programming scripts for computer and mobile applications. Verify data sourcing and calculations of each dataset identified to comprise the equity index score. Create the model and relevant formula used to calculate the equity index score and conduct initial data trials to identify errors/corrections. Utilize GIS digitization of equity indicators and targeted tracts/projects for pilot by importing and creating “master equity index layer” of tabulated equity scores for piloted tracts into ArcGIS mapping software; Import and create individual equity indicator layers for select indicators; Import and create relevant geographical shapefiles/layers for analysis. Manage team to building out and maintaining project database and/or data repository, monitoring- to ensure proper data quality control measures are in place at all times throughout the project life cycle.
30	E	Coordinate with internal staff and partnering state agencies and external stakeholders and tribal communities requested to weight and evaluate Equity Index via meaningful engagement. Support internal and external working groups to develop equity indicators. Be knowledgeable of racial and transportation equity driven approaches, tools, data, and policies at the federal, state, local level. Support and guide transportation research to advance state equity goals and maximize benefits to communities.
10	E	Coordination with Caltrans Division of Research, Innovation and System Information (DRISI) and other research groups to advise and lead preliminary investigations and larger research projects in relation to equity metrics, transportation metrics, and race and equity research. Convene working group during piloted phases to test and revise Equity Index as needed. Pilot tool on other programs and projects.
10	M	Provide critical analysis of policy, planning, legislation, guidance, etc as it pertains to racial equity and transportation equity for internal and external utilization and implementation.

¹ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.
MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

This position would support other staff in this work and coordinate with other offices and programs within Caltrans. Expected to supervise a team of planners as the workload increases.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The incumbent should have good personal computer skills, ability to work independently and as part of a team with others, resolve issues while maintaining close attention to detail and is expected to produce quality work within requested time frames with minimal supervision. Must be able to support other staff and managers, to receive general guidance from the CORE Program Manager and other management and to exercise a latitude of independent action. Adaptable to change and emerging state and federal guidance.

This position will develop and strengthen internal and external partnerships and foster collaborative approaches to creating, implementing, and achieving equity goals. The desired outcome is providing an equitable multi-modal network of transportation options that enrich all communities.

The work of this office requires strong technical skills to develop a tool while bringing in diverse stakeholders, and establishing collaboration with internal programs, federal, state, local and regional agencies, non-profit organizations, and advocacy and advisory groups.

The incumbent must have strong leadership skills, interest in supporting the Department's strategic goals and vision, and a

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commitment to advancing equity through all efforts.

Bachelor's degree in transportation planning, community planning, geographic information systems planning, urban planning or an equivalent combination of education and experience with strong connection to community.

The incumbent must be knowledgeable of...

- *The Department's mission, vision, goals, and policies

- *The transportation planning processes and a passion for and commitment to advancing racial equity, and experience leading conversations about race with diverse audiences.

- *Knowledge and usage of GIS, coding, and modeling software.

- *Clean transportation technologies

The incumbent must have the ability to...

- *Write effectively, speak clearly and in accessible manner, to gather, compile, analyze and interpret data.

- *Develop formats and present, display data, to consult effectively with other divisions and outside agencies. An ability to present ideas orally and work with others as a team is required.

- *Specify, estimate, and interpret basic models.

- *Skills and ability to engage with underserved populations.

The incumbent must Analytical skills...

- *Are required to define dilemmas and propose solutions that can be implemented within the context of the Department's overall role. Must be self-motivated, a quick thinker with strong analytical and socio-economic analysis skills, and a strong communicator.

- *To be able to identify transportation needs and trends, as well as issues with operations and performance.

The incumbent is accountable for assessing needs, establishing work plan, establishing and meeting delivery time frames, reporting success, elevating challenges, and regularly discusses progress with management and present updates and pilot to executive management.

Experience leading and developing technical reports and research, convening diverse working groups and meetings of small and large groups, consulting with external partners, and developing performance metrics and financial oversight preferred.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The consequences of errors can be serious and far-reaching; effecting the Department, regional transportation planning agencies, service providers, relationships with stakeholders, and the public. The incumbent is responsible for making recommendations on politically sensitive areas such as finding projects and programs solutions that benefit community needs.

PUBLIC AND INTERNAL CONTACTS

Internal – The incumbent has regular contact with the all Planning and Modal Program's offices, branches and district employees. The incumbent has contact with management staff including the Director's Office and district division chiefs.

External – The incumbent has contact with: regional and local transportation agencies, other state agencies like California Transportation Commission, California Transportation Agency, public stakeholders, tribal communities, community based organizations, and general public.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Must have the ability to work on a keyboard, manual dexterity, sitting for long periods, develop and maintain cooperative relationships and the ability to focus for long periods of time. Be able to multi-task, adapt to changes in priorities and complete tasks or projects with short notice. Must deal effectively with pressure, maintain focus and remain optimistic and persistent under adversity. To be considerate and respond appropriately to the needs, feelings and capabilities of different people in different situations, include the ability to facilitate discussions on challenging and emotionally-charged topics. Be tactful and treat others with respect and dignity.

WORK ENVIRONMENT

Employee will work in a climate-controlled office under artificial light. Because of periodic problems with heating and air conditioning, building temperature may fluctuate. During Work from home orders, home office environment may fluctuate.

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I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

EMPLOYEE (Print)

EMPLOYEE (Signature)	DATE
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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)	DATE
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